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FinancialPlanning

Retirement

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Reporter

Hello!

Years ago, I covered a Publishers Clearing House (PCH) "big check" presentation where they surprised a woman with a $50,000 prize. As the crew was leaving, Howie Guja, of the PCH Prize Patrol, warned the winner of grifters who might call once word spread.

That warning rang loudly in my ears as I wrote about how financial advisors can protect against scams targeting older clients, including one involving a previous PCH winner.

I hope you'll check it out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

Connect with Rob:

TOP STORIES

PRACTICE AND CLIENT MANAGEMENT

How advisors can protect older clients from financial scams

Scams targeting individuals aged 60 and older caused over $3.4 billion in losses in 2023 — an increase of approximately 11% from the year prior, according to the FBI.

- **Ask an Advisor: How to coordinate with outside professionals**
  How do financial advisors work with elder law attorneys or aging life care managers to support your clients?
- **How advisors help clients plan for pricey wedding tabs**

Even a modest ceremony can cost thousands, with the price tag for destination weddings easily crossing into five-digit figures and higher.

- **Global economy slowing, but not in recession, says report**
  Ned Davis Research analysis predicts the Federal Reserve will cut interest rates by 25 basis points at each of the remaining meetings this year, starting in September.
- **The Ladder: How patience paid off for the founder of an RIA that serves tech professionals**
  The former Amazon project manager now caters his firm to serving tech professionals.

Read the latest in Retirement

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Survey shows 70% of Americans juggle work and caregiving

While having a career and a family are two fundamental elements of the time-honored American Dream narrative, “having it all” isn’t all that it’s cracked up to be.

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